

## Get more out of your GoldMine CRM solution!



Ticomix, Inc. is offering instructor-led training designed to make your staff as productive as possible. What can you learn with us? Listed below is a syllabus for learning about critical aspects of GoldMine. Ticomix offers public training classes as well as on-site customized training.

### Course Description:

The GoldMine training will be approached from the perspective of a more experienced end-user. The skills to effectively navigate throughout GoldMine 6.6 will be covered including: adding and changing records, calendar, filters, correspondence, e-mail and reports tools of GoldMine.

### Student Profile and Prerequisites:

This course is designed for GoldMine Users who have been using the product and will be responsible for more complex tasks including customization for other end-users. They should have taken Introductory training and have considerable experience with the basic functionality of GoldMine.

## GoldMine 6.6 Advanced User Syllabus

### Editing Contacts

- Referrals

### Advanced Filters

- Expressions
- Creating A Complex Filter
- Editing Filters
- Drill Down
- Filter Limits

### Groups

- Using Groups
- Adding A Member
- Sorting A Group
- Using A Filter To Add Members
- Creating Groups
- Creating A Group From A Filter
- Creating A Group Based On Activities
- Creating A Group From A SQL Query

### Scheduling

- Scheduling To-Do Actions
- Scheduling Recurring Activities
- Editing Recurring Activities

- Checking The Activities Of Multiple Users
- Displaying Multiple Users On The Calendar
- Using The Planner
- Scheduling An Event
- Tracking Other Users' Activity
- Scheduling An Activity For Multiple Contacts
- Scheduling Meeting Requests

### Correspondence

- Dynamic Data Exchange
- The Word Link
- Creating A Letter Template In Word
- Merging To A Group Of Contacts
- Merging To Selected Additional Contacts
- Copying Contact Details

### Literature Fulfillment

- Scheduling A Literature Request
- Fulfilling A Literature Request
- Adding A Listing To The Literature List

### Messaging

- Sending A Phone Message
- Receiving A Phone Message
- Sending A Goldmine E-Mail Message
- Receiving A Goldmine E-Mail Message

### E-Mail

- Adding An E-Mail Address
- The E-Mail Center
- Reading E-Mail
- Sending E-Mail

### Introduction To Reports

- Printing Reports
- Reports And Filters
- Report Sorts

### The Organization Chart

- Using The Org Chart
- Managing Events
- Adding A New Section
- Replicating Data
- Activating And Releasing A Section
- Organization Chart Options